



***SWORD***

UPGRADE YOUR BUSINESS

SwordCTSpace

# FusionLive

## List of features



# Contents

<b>Introduction.....</b>	<b>1</b>
1. SaaS solution .....	2
2. Revolutionary User Interface .....	2
3. Document Management.....	2
3.1. Folder Structure.....	2
3.2. Document Lifecycle Management (DLC).....	3
3.3. Inbox / Outbox Functionality.....	4
3.4. Document Management Features.....	4
3.5. Document Auto-Distribution .....	4
3.6. Searching .....	5
3.7. Audit History .....	5
3.8. Document Attachments .....	5
3.9. Document Pre-Registration .....	5
3.10. Document Linking.....	6
3.11. Document Formats .....	6
3.12. Document Viewer .....	6
3.13. My Briefcase (Clipboard).....	6
3.14. Reprographics .....	6
4. Activities .....	6
4.1. Messages .....	7
4.2. Messages - Email Out .....	7
4.3. Transmittals .....	7
4.4. RFI (Request for Information) .....	7
4.5. TQ (Technical Queries) .....	7
4.6. Approval Submittals .....	7
4.7. Change Requests .....	7
5. Program Management.....	8
6. Dashboards .....	8
7. Contacts & Calendars .....	9
8. Reporting.....	9
9. Language Support.....	9
10. Administration .....	9
11. Branding .....	10
12. FusionLive Desktop Integration.....	10
13. Archiving.....	11



# Introduction

**FusionLive centralizes all of your project information in one trusted, structured & auditable location. With FusionLive, all project participants can find the appropriate version of the desired document or data and the information about what needs to be done by whom and when. From calendars to documents to reports, all aspects of the project system are integrated, allowing you to monitor aspects of the project in respect to a pre-agreed plan.**

As FusionLive is delivered as a service via the Internet, it is highly applicable for use across variable and dynamic project teams where there is no common IT infrastructure or desktop environment.

Using FusionLive as a document and drawings management system clients will:

- Be confident that the confidentiality of data stored on the system is maintained to the highest level.
- Share documents internally and seamlessly with the client and the supply chain and be confident that everyone is working with the most up-to-date information.
- Manage key workflow processes efficiently, maintaining a full audit trail of the communication.
- Focus on the business of building and maintaining of assets rather than maintaining complex IT solutions.
- Ensure that critical asset information is stored in an efficient manner and is easily locatable at any time in the future

The document and drawing management system helps improve the process of distributing project-related information, documents and communications by storing all the information in one centralized location. The system is used through all project stages — feasibility, design, construction, operations and maintenance etc.

The system allows the members of a project team to add and retrieve project-related documents quickly and easily. Additionally, a number of common work activities, such as RFIs and Change Requests, help make project-related communications more efficient. The system is completely secure and allows for complete control over whom has access to the various information stored within the workspace area.

The features and functions within the system allow users to more easily participate in a project and have access the latest version of documents. Documents are stored just once within the system, removing the need to distribute many copies of the same document.

The core features to be provided by the document and drawing management system are as follows:

## Benefits

---

Manage in a quick and efficient manner all project information

---

Manage immense volumes of documentation and correspondence

---

SaaS (Software as a Service) solution that significantly lowers total cost-of-ownership, reducing the expense from day one

---

Minimize errors and delays

---

Implement effective chains of communication

---

Encourage collaborative working

---

Mitigate risk and ensure regulatory compliance by maintaining a complete audit trail

---

Standardize best practice across projects

---

Improve visibility, control and problem diagnosis in the design and construction phases of the project

---

Leverage information from previous projects with archiving capabilities

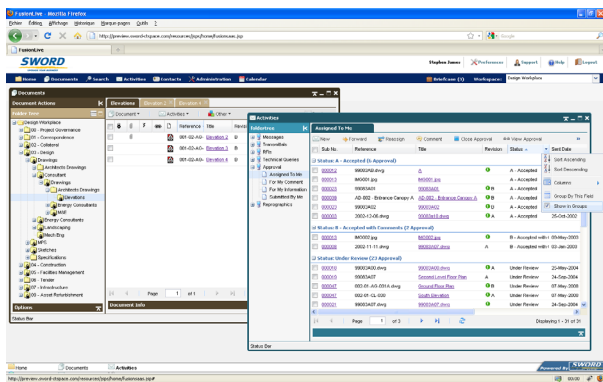
---

# 1. SaaS solution

FusionLive is an SaaS (Software as a Service) based solution, that provides secure, online work environments. FusionLive is hosted at several secure Data Centers around the world. It offers low cost of ownership and can be implemented within 24 hours. It takes literally minutes for any new organization to start collaborating on a project.

## 2. Revolutionary User Interface

SwordCTSpace developed FusionLive's interface based upon 13 years' experience designing web applications and receiving customer feedback. It offers an innovative User Interface that utilizes the latest web technology available. FusionLive works on any web browser (like IE, Firefox, Google Chrome and Safari on any platform, PC or Mac) and doesn't require any add-ons. Users possess all the flexibility of a desktop application like drag/drop columns, resize panel or even multiple windows on one screen. Lastly, the FusionLive User Interface is a high-powered interface as it is compatible with state-of-the-art hardware and because server calls and page refresh have been heavily optimised and fine tuned.



## 3. Document Management

FusionLive document management uses a folder structure supported by traditional enterprise document management features to provide a projects user community with secure access to documentation.

FusionLive document management features manage the efficient delivery and retrieval of project documentation and monitor project activity through each documents comprehensive audit history.

### 3.1. Folder Structure

One of the methods used to control the access to documents is the customizable folder structure and its associated customizable security facilities.

The folder security model determines who can publish and view in each of the folders in the structure. Folders are used to store and organize the files added to the project workspace. They can be arranged in much the same way as you would on your computer or network. A folder structure is defined at the start of the project as part of the project protocol definition so that there is a common understanding of how a project is to be executed.

Access to documentation can also be withheld using folder security. However, this is not the only method of withholding access. Document level security can also be used as outlined in the section **Document Lifecycle Management**, below.

The use of a folder structure provides a project the opportunity to introduce a common and structured approach to document access and control on a project. With FusionLive's additional document management features the folder structure no longer has to be the only method of controlling document access and can therefore be streamlined accordingly. This then affords flexibility when storing documents and allows groups of users or companies to control specific areas or sets of folders according to the demands of the project team.

## 3.2. Document Management Features

### Basic Features

All documents entered into FusionLive are required to have Meta data (Document Information) assigned to them; namely Reference, Title, Revision and Status.

This information provides the basis for any documents searches that will be performed in FusionLive and are therefore extremely important. Additional fields can be added at any time. There is a choice of field types and field name convention is open.

A document's filename, i.e. the name of the document as it is stored on the local PC, network, etc. is automatically saved to a Filename in FusionLive to support cross referencing. This is most apparent when two document referencing protocols are in use, namely a global project numbering scheme and the referencing protocol used by each of the participating companies.

### Advanced Features (ADM)

#### *Document Categorisation*

This allows for documents to be categories by e.g. Type, Drawings, Correspondence, etc., and for different Meta data values (Document Information) to be applied to each document type.

**NOTE:** THIS FEATURE IS OPTIONAL

#### *Numbering Protocol / Schema*

This allows a project wide customizable document referencing protocol to be put in place to support the project. This means that a project is able to define a document numbering standard and FusionLive allows for that standard to be implemented and made available to all users through the system.

When in place it sees users having to create document references using a selection of pre-defined fields. This then sees the formation of unique and universal project document references that everyone on the project understands and is able to use. The protocol can be configured to include any type of field required in the creation of the document reference, namely pick list, text field, date and auto counter.

This works very effectively in circumstances where a global approach on a scheme is required as it allows all participants to work to the same set of standards. This approach still allows all participants to maintain continuity with their own internal QA requirements as the Filename field in FusionLive will always carry the owner's reference will support their cross referencing requirement.

**NOTE:** THIS FEATURE IS OPTIONAL

#### *Unique Numbering*

When activated on a workspace this feature will ensure that each document carries a unique reference eliminating duplication and preventing errors.

**NOTE:** THIS FEATURE IS OPTIONAL

#### *Document Deletion*

As documents cannot be deleted from FusionLive a "soft" delete option, "Move to Trash", has been put in place to compliment the unique document referencing feature. This allows unique document references to be reused should the documents they have been applied to are either cancelled, withdrawn or voided.

### 3.3. Document Lifecycle Management (DLC)

Access to documents can also be controlled via document lifecycle status and these states are decided on by the project along with the security / viewers of a document given its lifecycle state at the time.

The states implemented would very often mimic those in use of the project with regard to the document review and approval process, Example: For Review, For Approval, For Construction.

Each of these states acts as gates to access, each having its own membership. This provides a layer of security around each document depending on its progress through its developmental path.

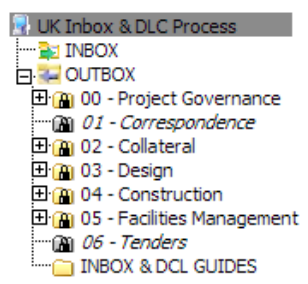
A distribution matrix can be configured for each of the states implemented that can be aligned to specifically along access, contractual or activity lines.

Who is able to update the states of the documents as they move through the process can be configured and will be set to fall in line with the review process and those involved at the key milestones.

This feature further reduces the risk that documents could be used at inopportune times during their development and provides a further basis for a robust document review process.

**NOTE:** THIS FEATURE IS OPTIONAL

### 3.4. Inbox / Outbox Functionality



This feature when tied into the DLC functionality further increases the project's management's ability to restrict the release / access to documents that have been published to FusionLive prior to them having undergone a quality assessment.

This feature sees project participants only being able to upload documents into the INBOX in FusionLive. At this point the document is only visible to the owners of the document and those on the project workspace setup to perform a QA role.

Once the QA team have reviewed the document for compliance they can either choose to accept or reject the document. The document can then be moved to the appropriate folder in the OUTBOX, with access to the document being governed by the status that has been set. Users will then be notified accordingly via the distribution matrix associated with that status.

The system can be configured to automatically pick-up new versions of documents and thereby make the process of revising documents more efficient.

**NOTE:** THIS FEATURE IS OPTIONAL.

### 3.5. Document Auto-Distribution

The feature, which has to be used in conjunction with FusionLive's numbering protocol functionality, allows documents to be distributed based upon and using a combination of a document's Reference, Revision, and Status.

This allows a distribution matrix to be put together that will allow documents to be distributed based upon document Reference and Meta data parts selected for a specific group of users.

When used the user will merely have to select the documents they wish to distribute and FusionLive will automatically the documents to the required users via the specified activity, namely an Approval Submittal, Reprographics, Message, etc.

**NOTE:** THIS FEATURE IS OPTIONAL

### 3.6. Searching

Within the system users can perform searches for documents across an entire workspace and searches will only include data they have access to. The search parameters available to perform searches are specific to a workspace and relate to the document information implemented into the workspace.

#### Searches

Searches can be performed using the Meta data allocated to documents that have been uploaded or that have been pre-registered.

Amongst the search criteria that can be used are the following:

- General information (document fields)
- Upload information (company, user and date)
- Document category information (if applicable)
- Document registration information (if applicable)

Searches can be performed throughout an entire workspace (all folders) and also across all versions of a particular document.

#### Saved Searches

Searches that are performed regularly can be saved and are available via a Saved Searches menu. These searches can also be shared with other workspaces users.

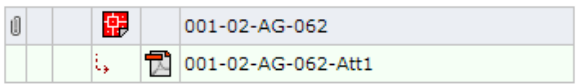
This option allows for searches to be used easily and efficiently when specific searches are done regularly. An example of this would be the need of a document management professional to perform exactly the same searches on a weekly or monthly basis.

### 3.7. Audit History

FusionLive retains a full audit history for documents and user interactions for each project workspace.

The full lifecycle of a document within the system can therefore be investigated and reported on if necessary. This audit trail includes creation, modification and revision history details, as well as the document’s association with business processes such as Transmittals, RFI’s, Messages, Approvals etc.

### 3.8. Document Attachments



Documents can be grouped or associated with one another within FusionLive by “attaching” them to a parent document. Attachments are referenced and behave in the same way as the parent document and can be revised individually or at the same time as the parent.

For example, a typical Attachment might be a read-only rendition of the parent or a supporting document.

### 3.9. Document Pre-Registration

This feature allows for placeholders for expected documents to be placed in the folder where it is expected to be uploaded.

The pre-registered item consists of Meta data, i.e. Title, reference, Revision, Status, etc., displayed in the same manner as an uploaded document but without the content.

Most importantly a Due Date can be captured against these pre-registered entries allowing them to be tracked and reported on as project deliverables. If overdue they will be displayed in “Red” where they are located.

### 3.10. Document Linking

This facility allows documents to be shared as links in other folders, workspaces and attachment lists. A document link is very much like a shortcut that you might use in Windows. Links can be created in folders and they will appear like any other document and can be actioned in much the same way.

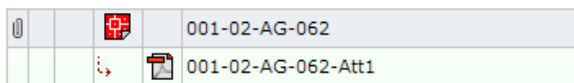
This is often used by clients to create a health and safety file or collate as built drawings. This affords a significant reduction in the time taken to generate the building manual at the end of the project which historically may have taken months to compile.

### 3.11. Document Formats

All formats and size of document are supported.

However, FusionLive can be configured to ALLOW specified document types to be uploaded as primary documents and to specify documents that will be allowed as attachments.

As the example shows below, a native drawing format, here a .dwg is the primary document and the .pdf the secondary.



### 3.12. Document Viewer

An integrated document viewer that allows users to view and mark-up files from within the system will be available. No formal installation of software will be required; an applet is downloaded automatically, the first time it is used. This technology allows users to view, zoom, print and comment on documents without the need for the native applications, Example - AutoCad, MicroStation, etc., to be present locally.

### 3.13. My Briefcase (Clipboard)

This facility allows users to collect documents into a virtual briefcase for sweeping up documents within a project that need to have tasks performed with them, for example, Revision, Status Changes, Review, Approval and Distribution.

### 3.14. Reprographics

Print jobs requests can be created online and sent through to a reprographics house for hard copy delivery using the system. The print shop will receive an email alert informing them that an online print request has been created and awaits their attention. They then are able to access the request via an online FusionLive Reprographics interface provided especially for this purpose.

They are then able to access the information via a secure area in the system where they can view the details of the print job and download the associated documents for printing. Multiple reprographic houses can be added to each project workspace.

This feature allows print job requests to be managed from creation through to closure by those that have created them via a Print Job Management interface within FusionLive.



## 4. Activities

Activities are pre-defined workflows that will manage all the messages and communications across the project. There are several types of activity available, and these will be switched on or off depending on the phase of the project. Users will receive external email or SMS alerts when messages are sent to them.

The different activity types available are as follows:

### 4.1. Messages

Messages are the basic communication activity type. They work in a similar way to regular email messages except that the messages cannot be deleted. Like email, messages can include attachments and can be replied to and forwarded onto other workspace users.

### 4.2. Messages - Email Out

Messages can be sent directly from FusionLive to external email. Documents can also be attached to these emails and will allow the information to be downloaded by the recipient(s).

The attached documents are accessed via a link presented in the email. Potentially large volumes of data can then be distributed via this method without falling foul of email file size limits usually imposed on email accounts.

The action of having sent these items to external recipients is captured in the audit history both within the activity itself and within the audit history of any documents that were attached.

### 4.3. Transmittals

Transmittals are used to record the delivery of documents (usually drawings) from one user or company to another. They are used to issue sets of drawings at various stages of a project and provide a complete audit trail of these important document deliveries.

When creating Transmittals, options are available to transmit the document either electronically (using the system) or using hard copy (by sending them off to a print house as a print job).

### 4.4. RFI (Request for Information)

FusionLive possesses a workflow module that allows for RFI's to be created and assigned for both answering and commenting.

During the process the RFIs can be reassigned and forward as required. The process can be monitored by both those participating in it and those designated in a management role.

A full range of online reports allows for dynamic reporting of RFIs throughout the duration of a project.

A customized numbering reference can be setup to support the RFI process.

### 4.5. TQ (Technical Queries)

FusionLive possesses a workflow module that allows for TQ's to be created and assigned for both answering and commenting.

During the process the TQ's can be reassigned and forward as required. The process can be monitored by both those participating in it and those designated a management role.

A full range of online reports allows for dynamic reporting of TQ's throughout the duration of a project.

A customized numbering reference can be setup to support the TQ process.

### 4.6. Approval Submittals

The Approvals modules allows documents to be routed through a review and approval process that sees all participants comments captured and sets a document's status once the process is finalized.

Each Submittal is uniquely numbered within the workspace and a full audit trail of the approvals that it contains is maintained automatically by the system.

A full range of online reports allows for the dynamic reporting of a workspace's Approval Submittals throughout the duration of a project. A reporting function also exists that allows for all approval data to be exported to an offline report.

#### 4.7. Change Requests

A Change Request is used to track any changes that require authorisation — in particular a change in the design that is different from the original specification. Often a change may have time and cost implications and the Change Request is able to record and track this information.

### 5. Program Management

This specific module of FusionLive provides a single environment to enable project teams to plan, execute and manage a large number of concurrent projects, a large number of concurrent projects being the norm in the retail industry, or for restaurant chains, bank branches, etc. Through integration project teams and managers now have real-time visibility into their portfolio of projects, enabling companies to run their projects on time and, more importantly, on budget.

**Standardize Project Best Practice** - Create definitions of the standard project types, this will define the project details, tasks, deliverables, business roles and folder structure used to execute the project. Authorized users can then create new projects by choosing a pre-defined template.

**Task Management** - Project administrators can create template tasks which define the activities that must be completed during the project lifecycle and the order in which they must be completed. These templates also define the different parties that should complete these tasks and their expected duration.

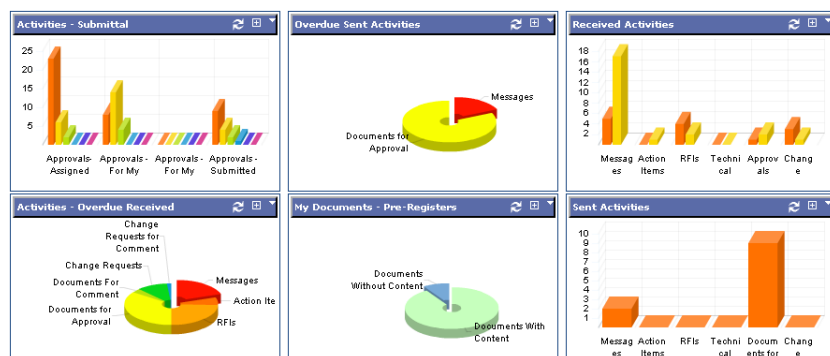
**Management Dashboards and Reports** - When a project entails a large number of activities it is virtually impossible to track each task, dependency and risk. With Program Management, managers can see, in real-time, the status of each task. This enables them to forecast the expected workload for a specific team. The solution provides managers with an effective way to drill-down into current tasks from a high level project summary. Overdue tasks are highlighted for the manager's attention and tasks can be searched using a number of criteria to improve visibility and problem diagnosis.

**Single Integrated Environment** - Project teams have instant access to the collaborative document management capabilities that they need in order to complete tasks. This provides managers and team members with a single, integrated environment to execute, manage and monitor the project.

#### Benefits:

- Real-time visibility of the portfolio of projects.
- Everyone associated with the project has the ability to monitor the status and progress of tasks.
- When starting a new project you can “cookie cut” from a standard project template, enabling you to get the project started faster and to comply with set specifications.
- Everyone associated with the project has access to the latest information.
- Visibility and problem diagnosis in the project is greatly improved.
- Managers can forecast expected workload for a specific team, re-schedule and review the project impact immediately.

### 6. Dashboards



The Dashboard area is designed to deliver a clear, concise summary of the various messages and activities within a Workspace that relate to individual users. There are various tabs that provide access to different information summaries, for example, the number of unread, incomplete or overdue Messages or Requests for Information (RFIs) etc. that have been sent or received by the user.

The summaries can be delivered in a “grid” format, or more recently, in graphical format, making the identification of outstanding tasks or bottlenecks even easier.

## 7. Contacts & Calendars

The Contacts facility displays a list of all the users that are part of the project workspace and serves as an address book for the team. The details are displayed according to the information entered by each individual user via their personal details section within the My Profile area. The users are displayed according to their designated role:

- Project User
- Company Administrator
- Workspace Administrator
- Calendar

The Calendar facility displays messages and activities that have due by or reply by dates set. They are displayed as links on the calendar pages under the appropriate date. Messages and Activities can then be easily accessed by clicking the appropriate link.

## 8. Reporting

Fusion**Live** provides a variety of reporting options to provide project related information to project users.

Within the project workspace there are reporting options that generate both operational or exception reports. The reports can be broken down into two types:

- Activities (RFIs, TQs, Approvals etc.)
- Workspace (Audit trail, Distribution and Folder access)

The activity reports deal with the activities that are active within the workspace and the workspace reports deal with what has been happening to the documents stored in the workspace.

There are additional reporting options specifically directed at project management that provide in-depth reports for specified activities via specially configured data extracts.

## 9. Language Support

Fusion**Live** currently supports the following languages:

- English (UK)
- English (US)
- French
- German
- Hungarian
- Italian
- Polish
- Russian
- Romanian
- Spanish
- Simplified Chinese
- Portuguese
- Turkish

## 10. Administration

The online Administration facility provides access to various functions and options that allow a user to alter the way in which the project behaves, either at a personal level or for the entire workspace. The role that a user has been assigned will determine the amount of admin options available to that user — there are several admin areas:

- My Profile (available to all users)
- Company Settings (available only to Company Administrators)
- Workspace Settings (available only to Workspace Administrators)
- Users, Groups & Companies (available only to Workspace Administrators)
- Workspace Homepage (available only to Workspace Administrators)

In addition, FusionLive supports some powerful standalone support and Administration tools that facilitate:-

- Bulk Folder creation
- Bulk Folder security creation and management
- Bulk Metadata Pre – Registration (Including auto numbering)
- Bulk Document Upload

## 11. Branding

FusionLive can support the customer's own logo within the user interface.

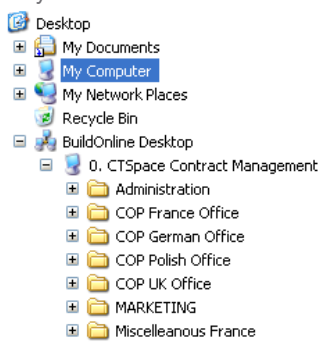
In addition FusionLive supports a “Workspace Home” landing page that can be extensively customised to the customer's requirements.

Typically, this landing page would contain:-

- Project and Project Team Details
- Project Bulletins
- Links to other Project related sites
- Project Images
- Project Bulletins
- Disclaimers and Confidentiality Notices
- Color Schemes

## 12. FusionLive Desktop Integration

FusionLive data can now also be accessed via an application, the FusionLive Desktop, that when installed sees a users FusionLive workspaces and associated folders and documents made available for use through Windows Explorer. The application requires a user to authenticate who they are using their FusionLive login details when they first use the application and this will then allow them to gain seamless access to the most up to date information via Windows Explorer when they have internet access.



When located, documents can be accessed using “Drag ‘n Drop” from or by opening them in the folder structure.



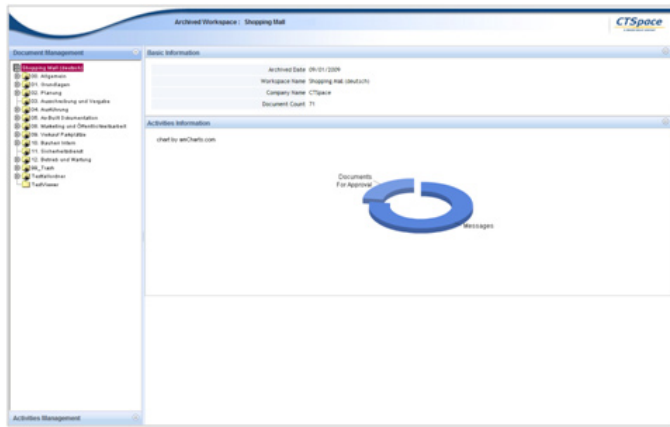
## 13. Archiving

At any point during a workspace's lifespan **SwordCTSpace** is able to provide archiving solutions that will support a number of archiving requirements:

### 'Read Only' Archive

The first archiving option is a read only version provided via a web browser interface. This option provides all the Document and Activity data on a suitable form of digital media, i.e. DVD, External Hard Drive, Pen Drive, etc.

This archive can be transferred from the media it is provided in and can be copied to other resources, namely a network drive or other digital media.



This archive can be provided either per entire workspace or per workspace and company, which allows an archive to be provided to a specific company that only, allows them to see the data they had access to within the workspace.

### Data Migration / Archiving Application

**SwordCTSpace** can provide a customized solution that will allow documents stored in a **FusionLive** workspace to be migrated directly from the database to a specified local resource (network) via the internet.

Once a user has logged into the application it connects directly with the **FusionLive** infrastructure via the Internet. The application can then be used to setup and configure archive behaviour.

This application can then be run against specific sets of data or against an entire workspace. It can be used to run an ongoing data "dumps" with the Archive only capturing the changes and downloading the data since the last archive was run.



For a complete listing of our  
offices please visit our website

[www.sword-group.com](http://www.sword-group.com)

[www.sword-ctspace.com](http://www.sword-ctspace.com)

**SwordCTSpace  
AMERICAS**

**e** [contact-us@sword-ctspace.com](mailto:contact-us@sword-ctspace.com)

**San Francisco**

49 Stevenson Street  
Suite 950  
San Francisco  
CA94105  
USA  
**t** +1 415 882 1888

**New York**

17 State Street  
26th Floor  
NY 10004  
USA  
**t** +1 212 279 6734

**Houston**

2500 City West Boulevard  
Suite 300  
TX 77042  
USA  
**t** +1 713 267 2330

**Chicago**

125 South Wacker Drive  
Suite 1110  
IL 60606  
USA  
**t** +1 312 447 5600

**Calgary**

10th Floor Bankers Hall  
West Tower, 888 - 3rd Street South  
West Calgary  
Canada T2P 5C5  
**t** +1 (403) 444-5983

**SwordCTSpace  
EUROPE & MIDDLE-EAST**

**Brentford, UK**

1000 Great West Road  
Brentford, Middlesex  
UK, TW8 9DW  
**t** +44 (0) 208 232 2555  
**e** [contact-uk@sword-ctspace.com](mailto:contact-uk@sword-ctspace.com)

**Dubai, UAE**

119-120 Building 13  
Dubai Internet City  
Dubai. PO Box 500406  
United Arab Emirates  
**t** +9714 361 6804  
**e** [contact-uae@sword-ctspace.com](mailto:contact-uae@sword-ctspace.com)

**Paris, France**

37 rue de Lyon  
75012 Paris  
France  
**t** +33 (0)1 44 67 24 20  
**e** [contact-france@sword-ctspace.com](mailto:contact-france@sword-ctspace.com)

**Frankfurt am Main, Germany**

Niddastraße 91  
60329 Frankfurt am Main  
Germany  
**t** +49 (0)69 686 023-0  
**e** [kontakt-deutschland@sword-ctspace.com](mailto:kontakt-deutschland@sword-ctspace.com)

**Madrid, Spain**

**t** +34 91 511 73 90  
**e** [contacto-espana@sword-ctspace.com](mailto:contacto-espana@sword-ctspace.com)

**Warsaw, Poland**

**t** +48 511 018909  
**e** [kontakt-polska@sword-ctspace.com](mailto:kontakt-polska@sword-ctspace.com)

**Moscow, Russia**

**e** [contact-russia@sword-ctspace.com](mailto:contact-russia@sword-ctspace.com)